



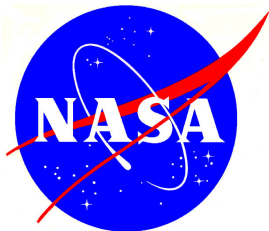
Integrated Financial Management Program

Core Financial

Course Name: Operating and Phasing Plans

Module 1: Operating Plans

Course Guide



Introduction

This course guide serves as the foundation for delivering training.

Course Structure

This course covers the basic SAP functionality that is needed to perform specific activities. Information beyond the scope of this class may be obtained from the On-Line Quick Reference (OLQR) tool or from designated Super-users.

Trainer Role

A trainer role in this training session is to:

- Provide end-users with the information they will need to learn the new skill set
- Provide end-users with guidance and coaching as they learn the new skills
- Maximize the hands-on practice time
- Ensure the objectives of the module are met
- Answer questions as completely as possible

End-user Role

An end-user's role in this training session is to:

- Participate in order to understand new roles, SAP concepts, processes, and principles presented
- Ask questions, when clarification is needed
- Complete all activities/exercises

Module Significance

SAP provides an automated means to prepare, record, and maintain operating plans within the Funds Management (FM) and Project Systems (PS) modules in SAP.

Module Structure

This module is structured so that the amount of hands-on practice utilizing SAP is maximized. Each of the topics is organized around the following structure:

Content

Lecture material is provided by the trainer on new roles, SAP concepts, processes, and principles.

Content Review

The trainer reviews key topic information at the conclusion of each topic.

Scenario

The trainer provides a description of a typical situation that will be used to practice the business activity within SAP.

Scenario Example: Based upon the approved Operating Plan, which was formulated during the budget formulation process, new funding codes will

need to be created in SAP before the plan can be recorded. The Budget Administrator will be notified of these changes and additions to the structures.

Demonstration

Trainer shows end-users how to perform the business activity in SAP.

Exercise

End-users practice the activity in the SAP training database.

Agenda

- Introduction and Background Knowledge – 0:15 hr
- Topic: Funds Management: Record and Maintain Operating Plans – 2:00 hr
 - Activity 1: Verify Initial Operating Plan/Operating Plan Changes (Manual) - 0:20 hr
 - Activity 2: Record/Revise Operating Plan by Center Levels 1-4 - 1:40 hr
- Course Summary – 0:15 hr
- Total – 2:30 hrs